



Career Planner User Guide

For Employees & Supervisors

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Definitions

Average Assessed Proficiency Rating: the score calculated by averaging the proficiency ratings provided by the employee in the self-assessment and/or the supervisor evaluation; if one proficiency rating was not provided, the assessed proficiency score included only the provided rating

Competency: a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully

Gap: an area where the employee has not met the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a negative value

Group: second level organization of a task within a competency

Resource: a course, website, handbook, etc. that is currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area to help employees learn and accomplish the important tasks that they are responsible for in their roles

Self-Assessed Proficiency Rating: the current proficiency level indicated by the employee for a specific task

Subgroup: third level organization of a task within a competency

Supervisor Assessed Proficiency Rating: the current proficiency level indicated by an employee's supervisor for a specific task

Surplus: an area where the employee has met or exceeded the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a positive value

Target Proficiency Rating: the expected level of proficiency for a given grade in a competency; serves as a benchmark when assessing employees' current level of proficiency

Task: an action that the individual needs to be able to perform in order to function in their job at the appropriate grade level; the majority of the tasks within the career planners apply to the job across the nation, but states have the ability to customize the career planner by adding additional state-specific tasks

Tool: a device or application that is currently available through NRCS and/or the FPAC Mission Area that supports an individual in completing a task

Introduction to the Career Planner

Description

A career planner is an interactive training plan that details the [tasks](#) that an employee needs to accomplish to do their job successfully. It is designed to help employees identify what training is needed in their current grade level and as they continue with their career at NRCS.

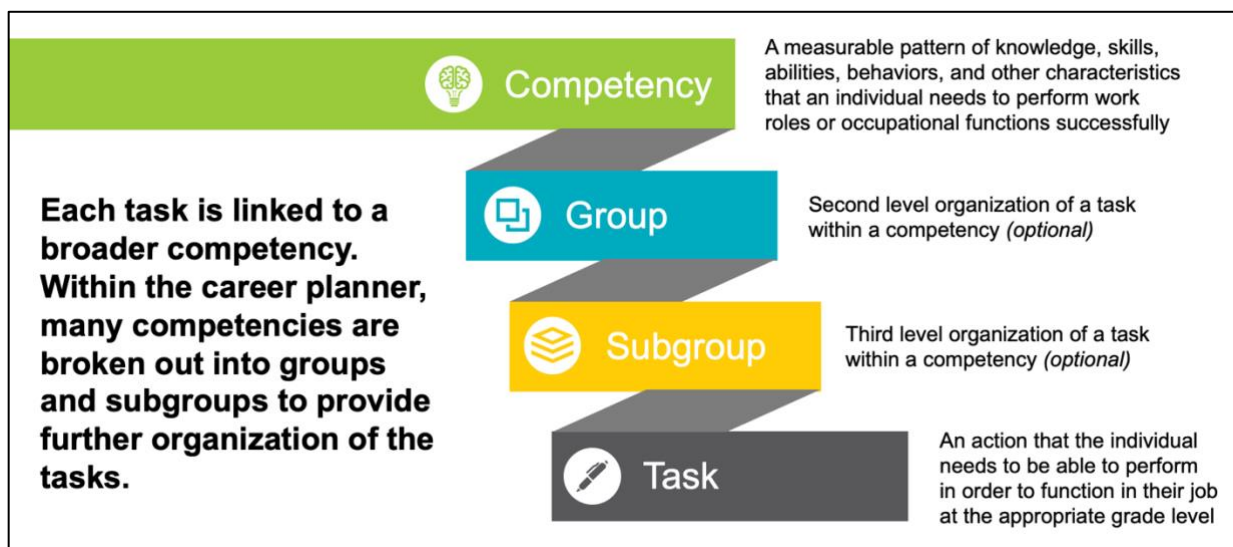


Figure 1: Organization of Tasks within Career Planners

Additionally, each task is linked to a list of [resources](#) and [tools](#) that are currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area that help employees accomplish that task. While the resources and tools listed within this document are comprehensive, they are not exhaustive.

The information within each career planner applies to the job across the nation. However, some customization may be needed for states, divisions, and centers. States, divisions, and centers can customize the career planner by adding additional state-specific tasks and resources. The [target proficiency ratings](#) within the planner may also be tailored to the job requirements of each individual employee at the discretion of the employee's supervisor. Individual employees do not have the ability to change the information within the career planner to ensure the job duties expectations are only set at the supervisory level and above.

Development

The career planner content was created using materials from the FPAC Mission Area (e.g., position descriptions) and outside sources (e.g., OPM's position classifications). Then, subject matter experts (SMEs) at various GS levels from across the country reviewed and edited the career planner content to ensure it accurately reflected what is needed to successfully perform the job. Following the workshop, a survey was administered to the SMEs to identify the importance of each task, whether each task was needed at entry, and the target proficiency rating for each task. Lastly, the information from the survey was analyzed and inputted into the career planner for the appropriate job series.

Use

An employee will first input [self-assessed proficiency rating](#) for each task into the career planner. Then, their supervisor will input their assessment for the employee for each task within the fields labeled "[supervisor assessed proficiency rating](#)." Once both of these types of ratings are entered, the [average assessed proficiency ratings](#) will automatically be calculated and populated within the career planner. The average assessed proficiency rating is then compared to the target proficiency rating, resulting in either a [gap](#), [surplus](#), or target met. Employees will then identify resource(s) and/or tool(s) that align with the tasks that they are deficient in.

From an agency perspective, NRCS will use the career planner for training and development purposes to add consistency and structure to employee development across the organization. Because career planners set standard expectations, they are an excellent starting point for expected knowledge, skills, and abilities of employees. The career planner provides a comprehensive roadmap for employee development at all grade and career levels. Career planners should **not** be used for performance management or promotion decisions.

Role & Responsibilities

States, Divisions, & Centers

Leaders at the states, divisions, and centers are responsible for encouraging the use of the career planners and adding state-, division-, and center-specific task information as needed. Instructions on how to do this are included in a separate user guide.

Supervisors

Supervisors are responsible for communicating and implementing the career planners with their employees as well as completing the supervisor portions of the career planner. Information on how to do this is included in this user guide.

Supervisors can alter target proficiency ratings within the planner so that they best fit the job requirements of each individual employee. However, this should **not** be a common occurrence as the nationally set target proficiency ratings were determined through a rigorous, data-driven process.

Employees

Employees are responsible for completing most of the career planner and coordinating its overall completion with their supervisor. Information on how to do this is included in this user guide.

Instructions - *Employees*

Step 1: Open the Career Planner

1. Locate the appropriate career planner for your state, division, or center as well as your series, job and/or role.
 - A. If your state, division, or center does not adopt and does not customize a career planner:
 - o Access the national version of the corresponding career planner on the national Career Planner SharePoint Page.
 - B. If your state, division, or center adopts but does not customize a career planner:
 - o Access the career planner on the appropriate state, division, center, or national SharePoint site.
 - C. If your state, division, or center adopts and customizes a career planner:
 - o Access the customized career planner on your internal SharePoint site.
2. Download and save a copy of the career planner file.
3. Open the career planner file using the Excel desktop application.
4. Click the **Enable Content** button in the yellow bar with the message "Macros have been disabled."



Step 2: Populate the Career Planner with your Identifying Information

1. Click the **Home** button under *Navigation*.
2. Input your name, working title, duty station and the date into the yellow boxes.

Name:		Date:		Duty Station:	
Working Title:		Grade:	Please select your GS level		

3. Provide your grade by selecting an option from the drop-down menu.
 - A GS level must be selected to review your competency assessment results and training plan.

Name:		Date:		Duty Station:	
Working Title:		Grade:	Please select your GS level		

4. Review your information to ensure it is accurate.

Step 3: Review Key Definitions and Target Ratings

1. Click the **Key Definitions & Target Ratings** button under *Navigation*.
2. Click the **Competency & Proficiency Definitions** button to review the definition of each competency and proficiency level.
 - *Note: The competencies in your career planner may vary from the ones shown below and throughout the user guide.*

Competency Definitions	
Competency	Competency Definition
Conservation Planning	Apply scientific knowledge to promote the conservation of soil, water, air, plants, animals, energy and humans
Farm Bill Program Management	Administer and manage Farm Bill program resources, projects, and activities to meet program goals and objectives
Compliance	Follow the applicable regulations and laws at the national, state and local levels
Technical Expertise	Apply knowledge of all areas of NRCS's conservation portfolio to assess and address various resource concerns
Outreach	Educate members of the public on natural resource conservation
Project/Program Management	Apply knowledge, skills, tools and techniques to manage activities and resources to meet project/program requirements
Foundational	Apply underlying and fundamental professional knowledge, skills and abilities to individually contribute to the organization
Leadership & Management	Apply strategic and advanced professional knowledge, skills and abilities to influence others as well as guide the organization

Proficiency Level Definitions	
Proficiency Level	Definition
5 - Master	- Demonstrates extensive depth and breadth of expertise in advanced concepts and processes. - Applies the competency in highly complex and ambiguous situations within and across disciplines. - Individuals operating at this level of proficiency serve as an acknowledged authority, advisor, and key resource within the agency in relation to this competency.
4 - Advanced	- Demonstrates extensive understanding of advanced concepts and processes. - Applies the competency in complex and unstructured situations. - Individuals operating at this level of proficiency seek guidance as needed and serve as a resource to others in relation to this competency.
3 - Fully Proficient	- Demonstrates thorough understanding of core concepts and processes. - Applies the competency in routine and non-routine situations. - Individuals operating at this level of proficiency work independently with minimal guidance and direction to perform tasks associated with this competency.
2 - Basic	- Demonstrates familiarity of concepts and processes. - Applies the competency to a wide range of routine, structured situations. - Individuals operating at this level of proficiency require regular, specific, guidance to perform tasks associated with this competency.
1 - Awareness	- Demonstrates a basic awareness of concepts and processes. - Applies the competency in the simplest situations. - Individuals operating at this level of proficiency require close and extensive guidance to perform tasks associated with this competency.
0 - No Proficiency	- Has no existing knowledge of concepts and processes. - Does not apply the competency. - Individuals operating at this level of proficiency require detailed instructions and complete oversight to perform tasks associated with this competency.

3. Click the **Target Proficiency Ratings** button to review the target proficiency levels associated with each competency and task at each GS level.

Group	Subgroup	Task	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Collection & Analysis	Identify Problems	Observe and document the resource concerns	1	1	1	1	2	3	4	4	4	4	4
Collection & Analysis	Identify Problems	Communicate with the producer to understand the resource concerns	1	1	1	1	2	3	4	4	4	4	4
Collection & Analysis	Determine Objectives	Communicate with the producer to determine and document their objective	1	1	1	1	2	3	4	4	4	4	4

4. Click the **Key Terms & Definitions** button to review definitions for key terms found in the career planner.

Key Terms & Definitions	
Term	Definition
Competency	A measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully
Group	Second level organization of a task within a competency
Subgroup	Third-level organization of a task within a competency
Task	Actions that the individual needs to be proficient in, at a certain level, in order to function in their job at the appropriate grade level
Short Term Goal	A task that you want to achieve the target proficiency in within one year
Mid Term Goal	A task that you want to achieve the target proficiency in within two years
Long Term Goal	A task that you want to achieve the target proficiency in over three years
Supervisor Assessed Proficiency Rating	The proficiency rating that an employee's supervisor believes the employee is currently operating at for a specific task
Self-Assessed Proficiency Rating	The proficiency rating that an employee believes they are currently operating at for a specific task
Average Assessed Proficiency	The score calculated by averaging the proficiency ratings provided via the self-assessment and/or supervisor evaluation; if one proficiency rating was not provided, the assessed proficiency score included only the provided rating
Target Proficiency Rating	The expected proficiency for a given grade in a competency; serves as a benchmark when assessing employees' current level of proficiency

Step 4: Input Your Current Proficiency Ratings

1. Click the **Competency Assessment** button under *Navigation*.
2. Use the **Competency** filter to select a competency and review the associated tasks.
 - Once a competency is selected, the competency button will turn blue.

Competency			Level	Abbreviated Proficiency Level Definitions <ul style="list-style-type: none"> • 0 - No Proficiency: not applied; require detailed instructions and complete oversight • 1 - Awareness: applied in simplest situations; require close and extensive guidance • 2 - Basic: applied in routine, structured situations; require regular, specific guidance • 3 - Fully Proficient: applied in non-routine situations; require minimal guidance • 4 - Advanced: applied in complex, unstructured situations; serve as a resource • 5 - Master: applied in highly complex, ambiguous situations; serve as an advisor 	Clear Ratings <i>"THIS CANNOT BE UNDONE"</i>
<div>Compliance</div> <div>Foundational</div> <div>Project/Program Management</div>	<div>Conservation Planning</div> <div>Leadership & Management</div> <div>Technical Expertise</div>	<div>Farm Bill Program...</div> <div>Outreach</div>	<div>National</div>		

3. Input your self-assessed proficiency rating for the chosen tasks using the drop-down menu.
 - Navigate to the column titled **Self-Assessed Proficiency Rating**.
 - Select a proficiency rating using the drop-down menu in the yellow boxes for the chosen task.
 - You do not need to provide a rating for all the tasks under each competency for the career planner to function correctly.

Competency	Group	Subgroup	Task	Level	Self-Assessed Proficiency Rating	Supervisor/Trainer Assessed Proficiency Rating	Target Proficiency Rating	Modified Target Proficiency Rating (Employee)
Conservation Planning	Collection & Analysis	Identify Problems	Observe and document the resource concerns	National				

Step 5: Email the Career Planner to your Supervisor

1. Save the changes you made to the career planner.
2. Email the career planner to your supervisor.
 - Attach the career planner Excel file to the email.
 - In your email, direct them to the supervisor instructions on the **Competency Assessment** screen and ask them to email the document back to you when they are finished.

IMPORTANT: It is recommended that you have supervisors complete their ratings for the competencies you filled out *before* you continue to the following steps.

Step 6: Identify Tool(s) and/or Resource(s) for Competencies and/or Tasks with Gaps

1. Open the completed career planner file you received from your supervisor using the Excel desktop application and save a copy.
2. Click the **Tools & Resources** button under *Navigation*.
3. Select Gap from the **Gap/Surplus** filter.

Competency			Gap/Surplus	Task
Compliance	Conservation Planning	Farm Bill Program Management	Gap	Accept and assume responsibility for one's own actions, words, products, and decisions and/or those of...
Foundational	Leadership & Management	Outreach	N/A	Adapt behaviors or work methods in response to new information, changing conditions, or unexpected...
Project/Program Management	Technical Expertise			Adapt conservation practices to address the unique circumstances and concerns of socially...
				Address non-compliance issues

4. Use the **Competency** and **Task** filters to select the competency and/or task you would like to view tools and resources for.
 - When a user clicks a blue button, all the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the button to the right of the filter header.

Competency			Gap/Surplus	Task
Compliance	Conservation Planning	Farm Bill Program Management	N/A	Complete annual FSA compliance status review
Foundational	Leadership & Management	Outreach		Complete Food Security Act work activities in compliance with federal, state, and local regulations, laws...
Project/Program Management	Technical Expertise			Conduct determination in accordance with national policies and state procedures
				Develop conservation planning and implementation plan for conservation planning and implementation...

5. Mark the corresponding tool(s) or resource(s) using the drop-down menu.
 - Navigate to the column labeled **Complete?**.
 - Mark the tool or resource as **"To-do"** or **complete** (check mark) using the drop-down menu in the yellow boxes.
 - Once a selection has been made from the drop-down menu, the yellow box will turn blue.
 - You do not need to provide a selection for all the tasks under each competency for the career planner to function correctly.

Competency	Group	Subgroup	Task	Level	Tool/Resource	Complete?	Gap/Surplus	Type of Goal?
Compliance	Other	Local, State & other Federal	Complete Food Security Act work activities in compliance with federal, state, and local regulations, laws and permits (e.g., Clean Water Act – Waters of the United States [CWA – WOTUS], National Environmental Policy Act [NEPA], Freedom of Information Act [FOIA])	National	7 CFR Part 650 – Compliance with NEPA		N/A	

Step 7: Review your Competency Assessment Results

- Click the **Results & Training Plan** button under *Navigation*.
 - A GS level must be selected to receive your results. To select a GS level, click the **Home** button under *Navigation*.
- Review your competency assessment results.
 - Filter by competency using the blue buttons under the competency header. When a user clicks a blue button, all the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the button to the right of the filter header.

Type of Goal	Competency			View Report	Gap/Surplus Legend:	Clear Type of Goal "THIS CANNOT BE UNDONE"
<input type="button" value="Gap not Current Goal"/> <input type="button" value="Long Term Goal"/> <input type="button" value="Mid Term Goal"/>	<input type="button" value="Compliance"/> <input type="button" value="Foundational"/> <input type="button" value="Project/Program Management"/>	<input type="button" value="Conservation Planning"/> <input type="button" value="Leadership & Management"/> <input type="button" value="Technical Expertise"/>	<input type="button" value="Farm Bill Program Management"/> <input type="button" value="Outreach"/>		<input type="checkbox"/> Surplus <input type="checkbox"/> Target Met <input type="checkbox"/> Gap	

Step 8: Determine your Goals

- Identify the type of goal for each competency gap using the drop-down menu.
 - Navigate to the column labeled, **Type of Goal**.
 - Mark the type of goal as **"short"**, **"mid"**, or **"long term"** using the drop-down menu in the yellow boxes.
 - Once a selection has been made from the drop-down menu, the type of goal will populate in the yellow box.
 - Make sure to select a type of goal for **all** applicable gaps.

Type of Goal	Gap/Surplus Size	Self-Assessed Proficiency Rating	Supervisor/Trainer Assessed Proficiency Rating	Average of the Assessed Proficiency Ratings	Target Proficiency Rating	Task	Competency	Level
					5	Explain the agency's vision, mission, functions, and organizational structure; explain how the agency's social, political, and technological systems work and operates effectively within them	Foundational	National

Step 9: View, Print, and Save your Training Plan

1. Click the **View Report** button to view your training plan.

The screenshot shows a web interface for managing training plans. On the left, there are buttons for 'Type of Goal' (Gap not Current Goal, Long Term Goal, Mid Term Goal) and 'Competency' (Compliance, Conservation Planning, Farm Bill Program Management, Foundational, Leadership & Management, Outreach, Project/Program Management, Technical Expertise). A 'View Report' button is highlighted with a red box. To the right is a 'Gap/Surplus Legend' with three categories: Surplus (green), Target Met (grey), and Gap (red). On the far right is a 'Clear Type of Goal' button with the text '*THIS CANNOT BE UNDONE*'.

2. Review your training plan.
 - Use the scroll bar to view the multiple sections of your report.
 - If you want to make edits to the data in your report, select the **Return to Results** button.

The screenshot shows the 'Competency Assessment Results and Training Plan Report' page. On the left sidebar, there are buttons for 'Return to Top', 'Return to Results' (highlighted with a red box), and 'Export Report to PDF'. Below these buttons are two notes: 'Note: PDF text will initially appear small. Please zoom in on the PDF export as needed.' and 'Note: If you receive an error attempting to export your report, please rename any older reports located in your documents folder and/or desktop.' The main content area has a blue header with the USDA logo and the text 'United States Department of Agriculture' and 'Natural Resources Conservation Service (NRCS)'. Below this, it says 'The following report contains data for:'.

3. Select the **Export Report to PDF** button on the left side of the window.
 - Your training plan will open as a PDF file in a new window.

This screenshot is identical to the previous one, showing the 'Competency Assessment Results and Training Plan Report' page. In this instance, the 'Export Report to PDF' button in the left sidebar is highlighted with a red box, indicating the next step in the process.

4. Save the PDF report to your computer, adding your name and the date to the file name.

ADDITIONAL FUNCTION: Import Previous Assessment

Use this function to import information from a previous career planner into a newer version of the career planner.

1. Open your previous career planner with your completed assessment and training plan, as well as the new version of the career planner without ratings.
2. On the PREVIOUS version of the planner, click the **Import Previous Assessment** button under *Navigation* then click the **Import Previous Information** button.
3. On the NEW version of the planner, click the **Import Previous Assessment** button under *Navigation* then click the **Update New Career Planner** button.

Instructions - *Supervisors*

Step 1: Open the Career Planner

1. Locate your employee's email with their attached career planner file.
2. Download and save a copy of the career planner file.
3. Open the career planner file using the Excel desktop application.
4. Click the **Enable Content** button in the yellow bar with the message "Macros have been disabled."



Step 2: Provide Employee Proficiency Ratings

1. Click the **Competency Assessment** button under *Navigation*.
2. Provide an assessed rating for the appropriate tasks and/or competencies using the drop-down menu.
 - *Navigate to the column labeled **Supervisor/Trainer Assessed Proficiency Rating**.*
 - *Select a proficiency rating using the drop-down menu in the yellow boxes for the chosen task.*

Competency	Group	Subgroup	Task	Level	Self-Assessed Proficiency Rating	Supervisor/Trainer Assessed Proficiency Rating	Target Proficiency Rating	Modified Target Proficiency Rating (Employee)
Conservation Planning	Collection & Analysis	Identify Problems	Observe and document the resource concerns	National				

IMPORTANT: A supervisor can modify their employee's target proficiency rating (as necessary) using the drop-down menu under **Modified Target Proficiency Rating (Employee)**. It is your responsibility as a supervisor to ensure that target ratings are only modified when necessary. Please communicate to your employee the reasoning why a target proficiency rating has been changed by you.

TIP: Reference the **Key Definitions & Target Ratings** page when providing your assessed proficiency ratings. Abbreviated definitions of the proficiency levels are:

- 0 – *No Proficiency*: not applied, require detailed instructions and complete oversight
- 1 – *Awareness*: applied in simplest situations; require close and extensive guidance
- 2 – *Basic*: applied in routine, structured situations; require regular, specific guidance
- 3 – *Fully Proficient*: applied in non-routine situations; require minimal guidance
- 4 – *Advanced*: applied in complex, unstructured situations; serve as a resource
- 5 – *Master*: applied in highly complex, ambiguous situations; serve as an advisor

Step 3: Email Career Planner to your Employee

1. Save the changes you made to the career planner.
2. Email the career planner to your employee.
 - *Attach the career planner Excel file to the email.*
 - *In your email, confirm with your employee that you have input the **Supervisor/Trainer Proficiency Ratings** for their tasks.*

